

METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS
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To: Members, Metropolitan Development Policy Committee

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Subject: Round 7.2 Cooperative Forecasts

Background -- Why are COG jurisdictions updating their Cooperative Forecasts?

COG established the Cooperative Forecasting Program in 1975 as the means by which local governments prepare projections of employment, population and households using common assumptions about future growth and development in the region. In 1991, the COG Board and Metropolitan Development Policy Committee (MDPC) adopted a policy that permits – *but does not require* – local governments to update their forecasts annually based on new development projects or changes to local comprehensive plans.

Several member jurisdictions requested the opportunity to update their projections in 2008 to reflect, for example, recent BRAC-related land use decisions, as well as changes due to current housing conditions. In addition, staff of the Northern Virginia Regional Commission (NVRC) and from the Interstate Commission on the Potomac River Basin (ICPRB) requested that COG prepare extrapolations of the Forecasts to the year 2040 for use in their respective drought and water supply planning programs. The jurisdiction-specific changes and assumptions are detailed in the transmittal letters that accompany the summary tables.

In addition to the COG member jurisdiction updates, Round 7.2 reflects changes received from non-COG members in the TPB model region, including Anne Arundel, Carroll, and Howard Counties in the Baltimore region; Calvert, Charles, and St. Mary's counties (Tri-County Council for Southern Maryland); and the city of Fredericksburg, and King George, Spotsylvania, and Stafford counties (the Fredericksburg Area Metropolitan Planning Organization.)

During their October 17, 2008 meeting, the Planning Directors Technical Advisory Committee reviewed and approved the draft Round 7.2 Forecasts and has recommended that the Metropolitan Development Policy Committee (MDPC) approve them for use by the TPB staff in the Air Quality Conformity Analysis of the 2009 Financially-Constrained Long-Range Plan (CLRP) and 2010-2015 Transportation Improvement Program (TIP).

Round 7.2 - Regional and Jurisdictional Trends

At the regional level, the Round 7.2 Forecasts are slightly lower than the currently-adopted Round 7.1 projections throughout the 2010 to 2030 forecast period. For example, the Round 7.2 employment forecasts for 2030 are lower than Round 7.1 by approximately 13,500 fewer jobs, while the Round 7.2 2030 household forecasts are lower than Round 7.1 by approximately 23,000 fewer households. While some local changes do reflect rezonings, much of the reduction in housing and employment throughout the forecast period are due to current uncertainties in the housing markets and the national economy which slightly reduce long-term growth.

At the regional and jurisdictional level, the Round 7.2 Forecasts show the following growth patterns:

Employment

- Approximately 1.5 million new jobs would be added by 2040 or an increase by 48 percent.
- Nearly 47 percent of the job growth would occur in the Inner Suburbs: 24 percent of the growth would occur in the Central Jurisdictions, and 30 percent of the job growth would occur in the Outer Jurisdictions.
- Among all jurisdictions, Fairfax County anticipates the greatest absolute increase (269,300) in new jobs between 2005 and 2040, followed by Montgomery County (220,000) and the District of Columbia (209,000).
- Loudoun County would continue to see the greatest percentage increase (134 percent) in new jobs between 2005 and 2040.

Population

- The region's population would increase by 1.9 million people or 38 percent between 2005 and 2040.
- More than 48 percent of the growth would be seen in the Outer Suburbs, the Inner Suburbs would account for 36 percent of the growth, and the Central Jurisdictions would contribute 16 percent of the total.
- Among all jurisdictions, Fairfax County anticipates the greatest absolute increase (278,700) in population, followed by Montgomery County (244,900) and Prince William County (226,200).
- Stafford County would experience the greatest percentage change (136 percent) in population between 2005 and 2040, followed by Loudoun County (85 percent).

Households

- More than 807,800 households would be added to the regional total by 2040 or an increase of more than 34 percent.
- More than 37 percent of the growth is foreseen in the Inner Suburbs; the Outer Suburbs would contribute about 43 percent; and the Central Jurisdictions would account for approximately 20 percent of the region's household growth.
- Among all jurisdictions, Montgomery County would experience the greatest absolute change (113,000) in households, followed by Fairfax County (110,200) and the District of Columbia (106,600).
- The fastest rate of household growth is anticipated in Stafford County (183 percent) followed by Loudoun County (88 percent) and Frederick County (86 percent).

The Round 7.2 Forecasts are the third and final update to the 7th major series or "Round" of Cooperative Forecasts. While the Forecasts do indicate some significant jurisdictional changes, as noted earlier, the employment, population and household forecasts are slightly lower at the regional level than the adopted Round 7.1 Forecasts for all years.

In several jurisdictions the residential growth forecasts (households and population) have been adjusted to reflect the current national and local challenges in the housing market. The long-term, structural changes to the region's economy, job base and housing stock will be addressed in research for the next major update to the Forecasts - Round 8.

Finally, COG staff has not yet received the small-area (traffic analysis zone or "TAZ") forecasts from the jurisdictions. However, because the Round 7.2 Forecasts are a minor annual update, it is unlikely that major regional changes will be seen in the share of jobs and housing projected within the Regional Activity Centers and Clusters, as well as within Metrorail station areas.

Next Steps

Following MDPC approval and receipt of jurisdictional TAZ-forecasts, TPB staff will promptly begin the Air Quality Conformity Analysis for the 2009 CLRP and 2010-2015 TIP to ensure timely approval of the CLRP in TIP by the TPB. Final approval of the Round 7.2 Forecasts by the COG Board of Directors is anticipated in June 2009. COG Board approval is intended to occur concurrently with TPB approval of the CLRP and TIP, which is necessary for the region to receive federal funding for proposed transportation improvements and programs identified in the CLRP and TIP.